



# CLIENT

## A Holistic Approach To Your Business & Personal Finances

### KEY CATEGORIES

- ACCOUNTING, TECHNOLOGY, MANAGEMENT INFORMATION & CONTROLS
- BUSINESS
- HUMAN RESOURCES
- MANAGEMENT GOALS & OBJECTIVES
- MARKETING
- PERSONAL FINANCIAL WELL-BEING
- PRODUCTION
- PRODUCTS & SERVICES
- SOURCES & ADEQUACY OF CAPITAL

Let's be honest—accounting is usually known as a historical profession. As your CPA, we tell you how you did financially the previous year. But, what about this year? Why don't we talk about how your business is performing today as well as how it will perform in the future?

Client 361 is BMSS' unique service in which we walk you through the **major operational functions** of your business as well as the decisions that could impact your **personal well-being**. Through our Client 361 program, we take a **holistic** look at your business and personal finances—**asking you questions** about your sources of capital, production process, cybersecurity, human resources, estate planning and more—and offer **comprehensive analysis** of your responses and **actionable steps** for success. More than a static 360-degree snapshot of where you are today, Client 361 goes a degree beyond, helping you make informed decisions and prepare for tomorrow.

Our #1 goal is to create **peace of mind** for you. Client 361 is our wraparound service that helps make this happen.

For more information and to begin the Client 361 process, call your BMSS CPA today. We'll walk you through a series of important questions to learn your goals as well as your pain points.